TOPIC 3: ESTABLISHING EMPLOYEE ATTRIBUTES

The purpose of this topic is to present the procedures related to entering basic employee information in the SAM II HR/Payroll System. Once the ESMT has been completed, approved and accepted, there are several other transactions that are used to enter employee information. This topic will look at the three additional required transactions - Employee Address Maintenance (ADDR), Employee Attributes Maintenance (ATTR), and Agency Specific and Accounting Data (AGYS) transactions. Several optional transactions will also be covered, including the Licenses and Certifications (LCNS), Emergency Contact Information (EMER), and Pass Information (PASS).

At the end of this topic, you will be able to:

- Complete, change and process the required transactions – Employee Address Maintenance, Employee Attributes Maintenance and Agency Specific and Accounting Data
- Complete and process the optional transactions – Licenses and Certification, Emergency Contact Information and Pass Information

EMPLOYEE MAINTENANCE PROCESS CHART

Step 1: ESTABLISHING AN EMPLOYEE

Employment Status Maintenance (ESMT)

Step 2: ESTABLISHING & MAINTAINING EMPLOYEE ATTRIBUTES

Employee Address Maintenance (ADDR)

Licenses and Certifications (LCNS)

Employee Attributes Maintenance (ATTR)

Employee Contact Information (EMER)

Agency Specific & Accounting Data (AGYS, AGYA, AGYD)

Pass Information (PASS)

Employee ID Change (EIDC)

Employee Name Change (ENCH)

Step 3: PERFORMING PERSONNEL ACTIONS

Employment Status Maintenance (ESMT)

Step 4: EMPLOYEE MAINTENANCE INQUIRIES

- Employee Roster by Name (QXRF)
- Employee Roster by Employee ID (QXR2)
- Employee Roster by Social Security Number (QXR4)
- Employee Roster by Pay Location (QXR5)
- Employee Roster by Agency and Organization (QXR6)
- Employee Folder (QXRSF)
- Employee Pay Rate History (QRTE)
- Employee Pay Summary Inquiry (QPSM)
- Employment Verification (QVER)
- Employee Education Summary (QEDS)
- Historical Name Change Cross Reference (QNCX)
- Employment Status Maintenance Log Detail (QESD)
- County by Name (QCTY)

EMPLOYEE INFORMATION

Once the ESMT has been completed, approved and accepted, there are additional transactions the user must enter to capture basic employee information into the system. These transactions relate to basic personal information and specific accounting information. Processing of the ESMT and other necessary transactions is required before any employee can be paid by the SAM II HR/Payroll System.

Transactions required to enter basic employee information are the Employee Address Maintenance (ADDR), the Employee Attributes Maintenance (ATTR) and the Agency Specific and Accounting Data (AGYS). The ADDR records the employee’s home address and mailing address. The ATTR records basic employee personal attributes such as EEO information, date of birth and veteran information. The AGYS records agency specific information and accounting attributes relating to the employee.

There are other transactions used by the SAM II HR/Payroll System to enter additional employee information. These transactions are optional to complete and may or may not be used by your agency. This topic will include the steps necessary to fill out the Licenses and Certifications (LCNS), the Emergency Contact Information (EMER) and the Pass Information (PASS) transactions.

EMPLOYEE MAINTENANCE PROCESS CHART

Step 1: ESTABLISHING AN EMPLOYEE

Employment Status Maintenance (ESMT)

Step 2: ESTABLISHING & MAINTAINING EMPLOYEE ATTRIBUTES

Employee Address Maintenance (ADDR)

Licenses and Certifications (LCNS)

Employee Attributes Maintenance (ATTR)

Employee Contact Information (EMER)

Agency Specific & Accounting Data (AGYS, AGYA, AGYD)

Pass Information (PASS)

Employee ID Change (EIDC)

Employee Name Change (ENCH)

Step 3: PERFORMING PERSONNEL ACTIONS

Employment Status Maintenance (ESMT)

Step 4: EMPLOYEE MAINTENANCE INQUIRIES

- ☐ Employee Roster by Name (QXRF)
- ☐ Employee Roster by Employee ID (QXR2)
- ☐ Employee Roster by Social Security Number (QXR4)
- ☐ Employee Roster by Pay Location (QXR5)
- ☐ Employee Roster by Agency and Organization (QXR6)
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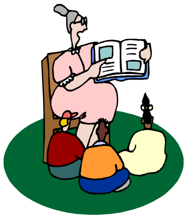
- ☐ Employee Pay Summary Inquiry (QPSM)
- ☐ Employment Verification (QVER)
- ☐ Employee Education Summary (QEDS)
- ☐ Historical Name Change Cross Reference (QNCX)
- ☐ Employment Status Maintenance Log Detail (QESD)
- ☐ County by Name (QCTY)



SCENARIO

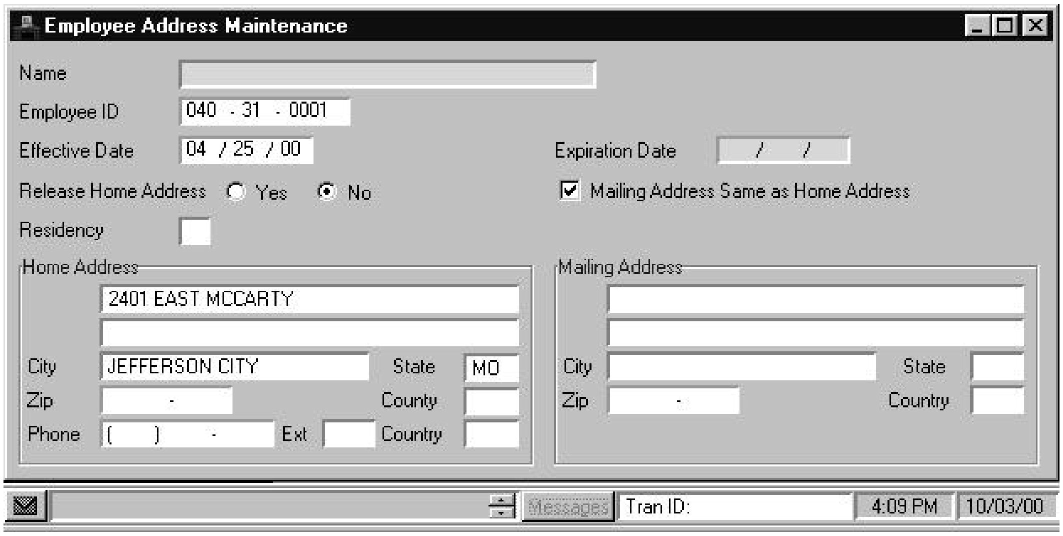
A decision has been made by the Office of Administration, Division of Personnel, to hire Jenny Sue Grant to fill the position of Personnel Analyst I effective today. This is Jenny's first job with the State of Missouri. The first thing that needs to be done is to establish Jenny as an employee in the SAM II HR/Payroll System using the Employment Status Maintenance (ESMT) transaction, followed by completing other transactions. The information below, which has been derived from Jenny's application and resume, will be used.

SSN	(to be provided in your training class on a student card)
Birthdate	October 23, 1970
Address	2401 East McCarty Jefferson City, MO 65101
Place of birth	Jefferson City, MO
Ethnicity	White
Disability	None
Citizenship Status	Natural Citizen
Conviction	None
Marital Status	Single
Country of Residence	USA
Education at Appointment	Bachelor's degree in Business Administration; minor in Counseling
Veteran Information	Not a veteran
License/Certification Type	CPR and First Responder
Issue Country	USA
Issue State	MO
License/Certificate Number	99-01
Effective Date	February 1, 2000
Expiration Date	February 1, 2001

Jenny resides with her sister, Jody, who is designated as her contact in case of emergency. Jody's office phone number is 659-1003; their home number is 893-9891. Jenny will receive an employee ID badge and an office key.

It is necessary that additional information be acquired to establish Jenny as an employee in the system – that is, agency information such as Position Number, Agency and Organization Codes, Personnel Action, Job/Employment Status information, salary information, and certificate information. The means of communicating this information to you may vary from one agency to another (standard written form, verbal communication from the hiring supervisor, etc.).

EMPLOYEE ADDRESS MAINTENANCE (ADDR)



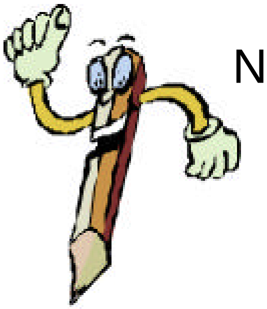
Employee Address Maintenance

Name
Employee ID 040 - 31 - 0001
Effective Date 04 / 25 / 00
Expiration Date / /
Release Home Address ○ Yes ● No
☑ Mailing Address Same as Home Address
Residency

Home Address
2401 EAST MCCARTY
City JEFFERSON CITY
State MO
Zip -
County
Phone ( ) -
Ext
Country

Mailing Address
City
State
Zip -
Country

Tran ID:
4:09 PM
10/03/00



NOTES

EMPLOYEE ADDRESS MAINTENANCE (ADDR)

Let’s take a look at the Employee Address Maintenance (ADDR) transaction. As mentioned earlier, the ADDR transaction is used to view or record an employee's address and phone number. It is also used to record any changes to the address or phone. Now we will enter Jenny Grant’s address information. Her address is as follows: 2401 East McCarty, Jefferson City, Mo., 65101.

Step 1 To open ADDR from the SAM II Desktop Navigator window, click on the Go To icon. Type ADDR in the “CODE”. Click on the Open button.

Step 2 Populate the following fields on the ADDR.

NAME - Inferred. The name of the employee is displayed.

EMPLOYEE ID - Required. Enter the employee’s social security number. **SEE STUDENT CARD**.

EFFECTIVE DATE - Required. Enter the date the home or mailing address is effective. Type **TODAY'S DATE**.

EXPIRATION DATE – Inferred. This field defaults to “99/99/99”.

RELEASE HOME ADDRESS - Required. Select “Yes” if the employee has authorized the state to release the address to non-State of Missouri parties. Select **NO**.

MAILING ADDRESS SAME AS HOME ADDRESS - Required. The employee’s home address will serve as their mailing address if the “Mailing Address Same as Home Address” checkbox is selected. If the employee’s mailing address is different from the home address, do not select. **CHECK BOX**.

RESIDENCY - Not used by the State of Missouri.

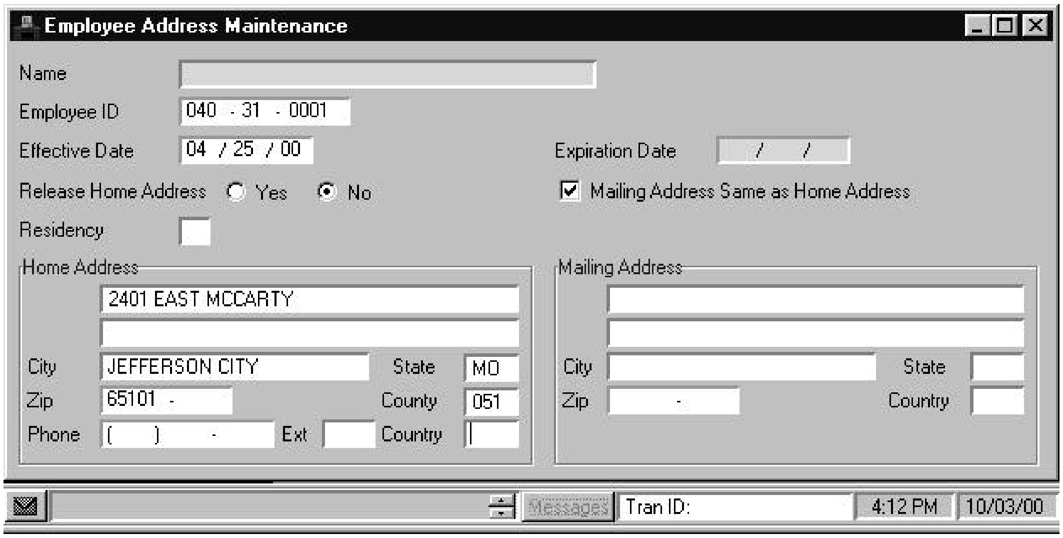
Home Address

HOME ADDRESS - Required. Enter the employee’s home address (street number, street, and apartment number, if applicable). Use the second line to continue the home address if additional space is needed. Type **2401 EAST MCCARTY**.

CITY - Required. Enter the city name of the employee’s home address. Type **JEFFERSON CITY**.

STATE - Required. Enter the state code of the employee’s home address. Valid values are located on the State (ST) window. Type **MO**.

EMPLOYEE ADDRESS MAINTENANCE (ADDR)

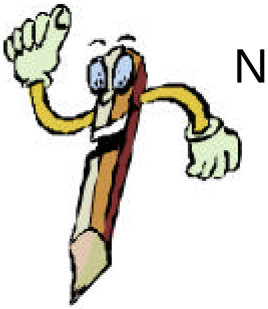


Name
Employee ID 040 - 31 - 0001
Effective Date 04 / 25 / 00
Expiration Date / /
Release Home Address ○ Yes ● No
☑ Mailing Address Same as Home Address
Residency

Home Address
2401 EAST MCCARTY
City JEFFERSON CITY State MO
Zip 65101 - County 051
Phone ( ) - Ext Country

Mailing Address
City State
Zip - Country

Tran ID:
4:12 PM
10/03/00



NOTES

EMPLOYEE ADDRESS MAINTENANCE (ADDR)

Step 2 Continue to populate the fields on the ADDR.

ZIP - Required. Enter the zip code of the employee's home address. Type **65101**.

COUNTY – Required. Enter the code indicating the county in which the employee resides. Valid values are located on the County (CNTY) window. Type **051**.

PHONE – Optional. Leave blank, or enter the telephone number (area code and number) of the employee's home address. Type **573-893-9891**.

EXT – Optional. Leave blank, or enter the extension to the employee's home address telephone number.

COUNTRY – Conditional. Enter the country code of the employee's home address. Valid values are located on the Country (CTRY) window.

Mailing Address

MAILING ADDRESS - Conditional. Required if the "Mailing Address Same as Home Address" checkbox is not selected. Enter the employee's mailing address (street number, street, and apartment number, if applicable).

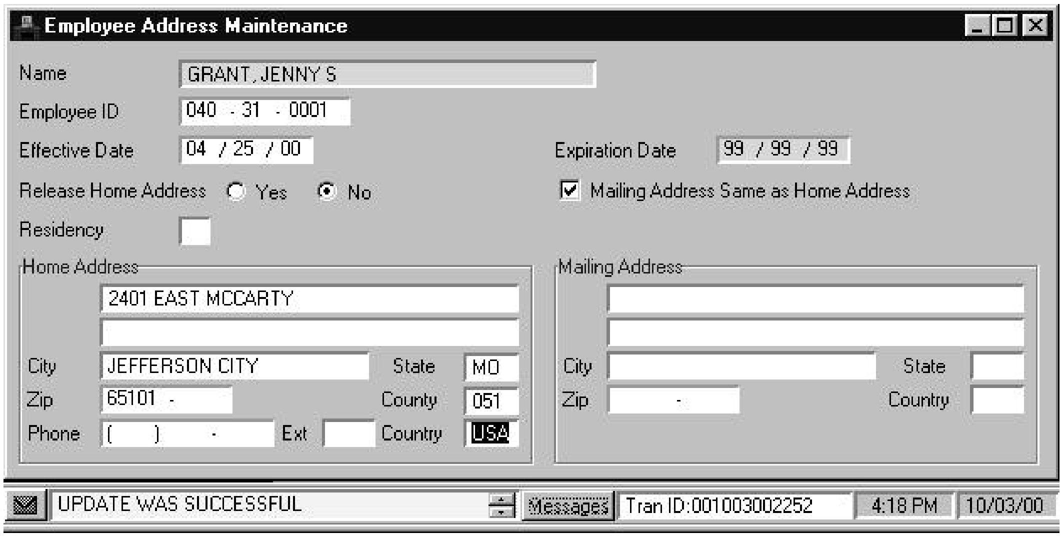
CITY - Conditional. Required if the "Mailing Address Same as Home Address" checkbox is not selected. Enter the city name of the employee's mailing address.

STATE - Conditional. Required if the "Mailing Address Same as Home Address" checkbox is not selected. Enter the state code of the employee's mailing address. Valid values are located on the State (ST) window.

ZIP - Conditional. Required if the "Mailing Address Same as Home Address" checkbox is not selected. Enter the zip code of the employee's mailing address.

COUNTRY – Conditional. Required if the "Mailing Address Same as Home Address" checkbox is not selected. Default is USA. If different, enter the country code of the employee's mailing address. Valid values are located on the Country (CTRY) window.

PROCESS AND UPDATE EMPLOYEE ADDRESS MAINTENANCE (ADDR)

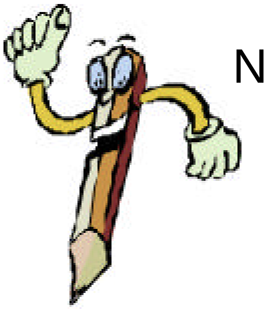

Employee Address Maintenance
Home Address
Mailing Address
Messages

Name: GRANT, JENNY S
Employee ID: 040 - 31 - 0001
Effective Date: 04 / 25 / 00
Expiration Date: 99 / 99 / 99
Release Home Address: ○ Yes ● No
☑ Mailing Address Same as Home Address
Residency:

Home Address: 2401 EAST MCCARTY
City: JEFFERSON CITY
State: MO
Zip: 65101 -
County: 051
Phone: ( ) -
Ext:
Country: USA

Mailing Address:
City:
State:
Zip: -
Country:

UPDATE WAS SUCCESSFUL
Tran ID:001003002252
4:18 PM
10/03/00



NOTES

PROCESS AND UPDATE EMPLOYEE ADDRESS MAINTENANCE (ADDR)

You have completed entering the field information for the ADDR and it is time to update the transaction. This transaction does not need any approvals.

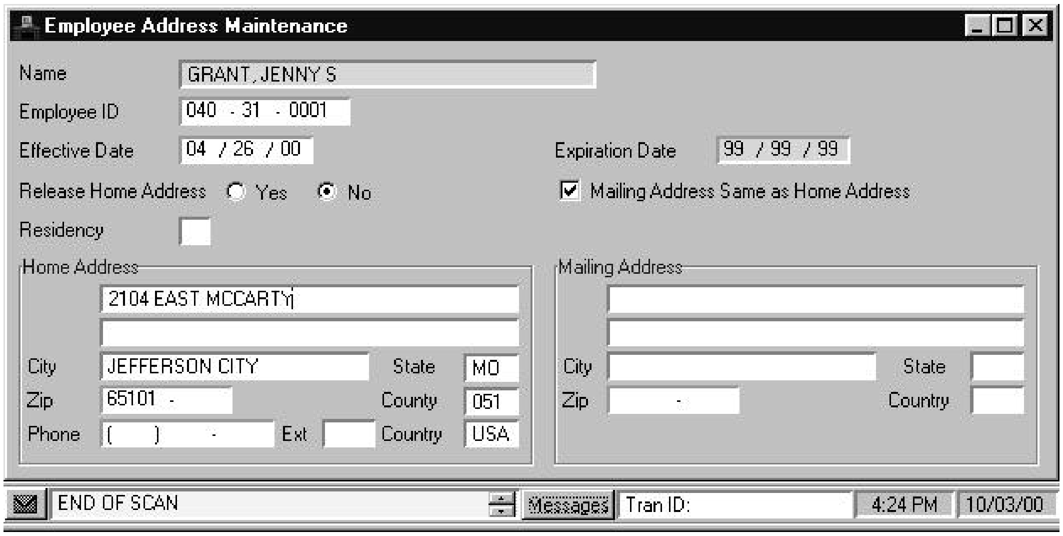
Let's complete the approval processing of the ADDR:

Step 1 Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors, and select **Process: Update.** If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful.

Let's proceed to learn how to change employee address information on the ADDR.

CHANGING EMPLOYEE INFORMATION ON THE (ADDR)



Name GRANT, JENNY S

Employee ID 040 - 31 - 0001

Effective Date 04 / 26 / 00

Expiration Date 99 / 99 / 99

Release Home Address ○ Yes ● No

☑ Mailing Address Same as Home Address

Residency

Home Address

2104 EAST MCCARTY

City JEFFERSON CITY State MO

Zip 65101 - County 051

Phone ( ) - Ext Country USA

Mailing Address

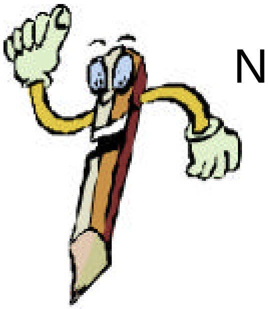
City State

Zip - Country

END OF SCAN

Tran ID:

4:24 PM 10/03/00



NOTES

CHANGING EMPLOYEE INFORMATION ON THE (ADDR)

After processing the Employee Address Maintenance (ADDR) transaction, you noticed the next day that Jenny's mailing address was incorrect.

In order to change the mailing address on the ADDR, the information must be entered on the ADDR.

Step 1 Open the ADDR.

Step 2 Enter the required information in the following field.

EMPLOYEE ID (social security number) **- SEE STUDENT CARD**.

Select **DISPLAY: BROWSE DATA** to view the existing address information.

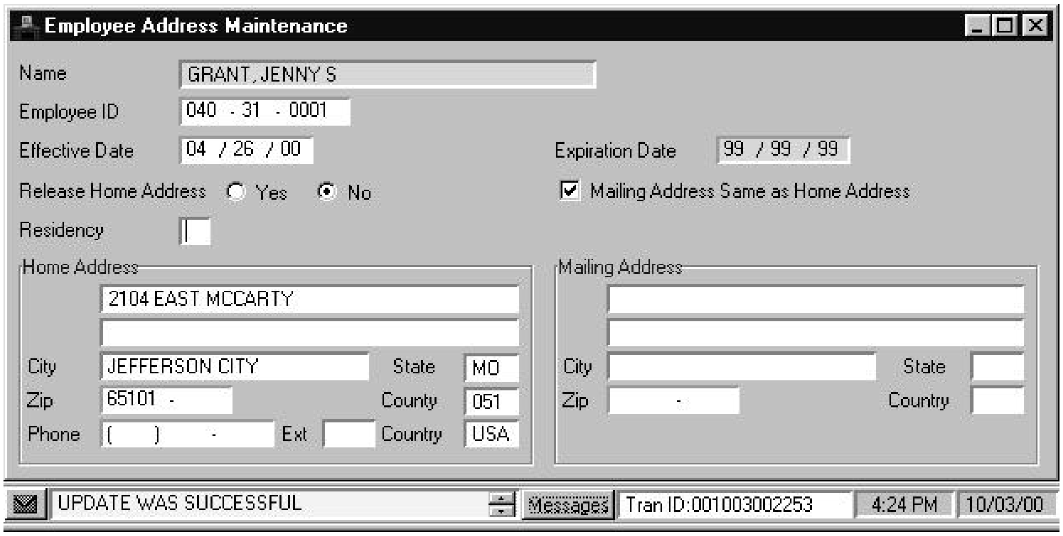
Step 3 Enter the information you are changing on the ADDR window.

EFFECTIVE DATE – Type **TOMORROW'S DATE**.

HOME ADDRESS – Type **2104 EAST MCCARTY**.

NOTE: In the SAM II HR/Payroll System, the Effective Date and Expiration Date fields are very important. When a new effective date is entered, an expiration date will be entered on the previous transaction, which is one day before the new effective date. This enables the State of Missouri to maintain historical data.

PROCESS AND UPDATING EMPLOYEE INFORMATION CHANGES ON THE (ADDR)



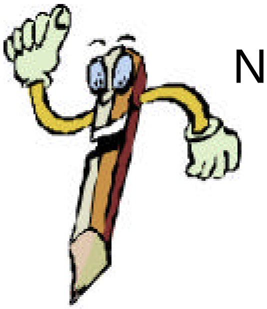
Employee Address Maintenance

Name: GRANT, JENNY S
Employee ID: 040 - 31 - 0001
Effective Date: 04 / 26 / 00
Expiration Date: 99 / 99 / 99
Release Home Address: ○ Yes ● No
☑ Mailing Address Same as Home Address
Residency:

Home Address
2104 EAST MCCARTY
City: JEFFERSON CITY
State: MO
Zip: 65101 -
County: 051
Phone: ( ) -
Ext:
Country: USA

Mailing Address
City:
State:
Zip: -
Country:

UPDATE WAS SUCCESSFUL
Tran ID:001003002253
4:24 PM
10/03/00



NOTES

PROCESS AND UPDATING EMPLOYEE INFORMATION CHANGES ON THE (ADDR)

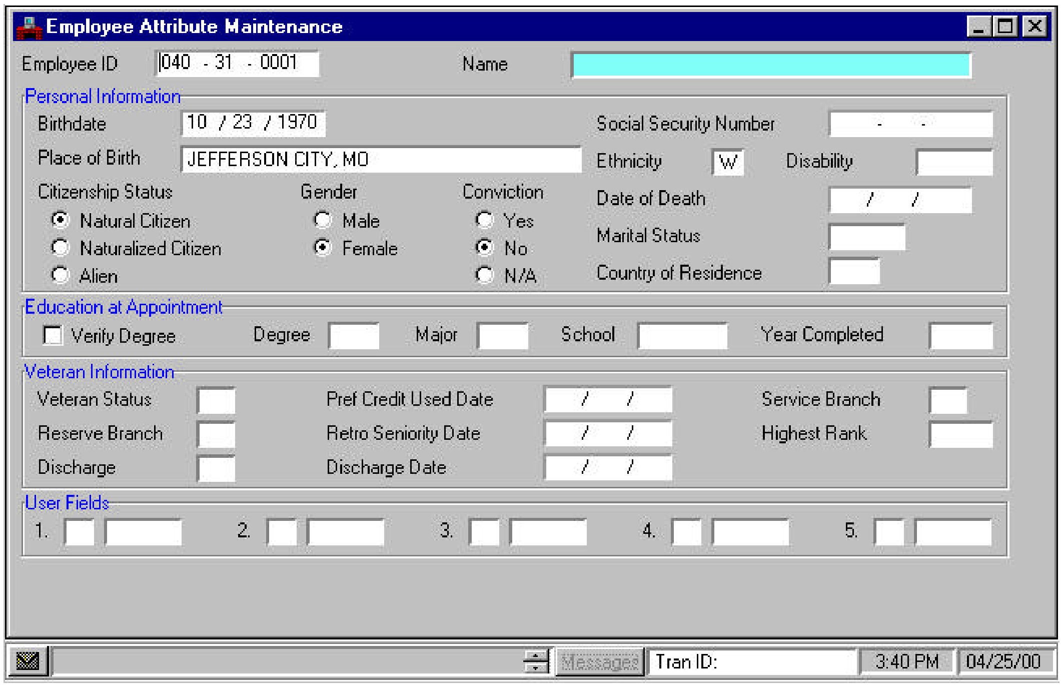
You have completed entering the field information for the ADDR and it is time to update the transaction.

Select **Process: Update.**

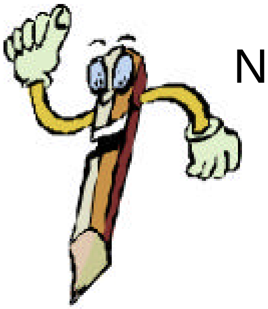
If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and, select **Process: Update.** If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful.

Let’s proceed to look at the Employee Attribute Maintenance (ATTR) transaction.

EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)


Employee Attribute Maintenance
Personal Information
Education at Appointment
Veteran Information
User Fields
1.
2.
3.
4.
5.
Messages

Employee ID: 040 - 31 - 0001
Name:
Birthdate: 10 / 23 / 1970
Place of Birth: JEFFERSON CITY, MO
Citizenship Status: ● Natural Citizen ○ Naturalized Citizen ○ Alien
Gender: ○ Male ● Female
Conviction: ○ Yes ● No ○ N/A
Social Security Number: - -
Ethnicity: W
Disability:
Date of Death: / /
Marital Status:
Country of Residence:
☐ Verify Degree
Degree:
Major:
School:
Year Completed:
Veteran Status:
Reserve Branch:
Discharge:
Pref Credit Used Date: / /
Retro Seniority Date: / /
Discharge Date: / /
Service Branch:
Highest Rank:
Tran ID:
3:40 PM
04/25/00



NOTES

EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)

The Employee Attribute Maintenance (ATTR) transaction is used to record and view basic employee personal attributes such as date of birth, education at appointment and veteran information. Let's enter Jenny Grant's information. She was born on October 23, 1970 in Jefferson City, Mo. Jenny is a single white woman with a Bachelor's degree in Business Administration. She graduated in 1993 from Kentucky State University.

Step 1 To open ATTR from the SAM II Desktop Navigator window, click on the Go To icon. Type ATTR in the "CODE". Click on the Open button.

Step 2 Populate the following fields on the ATTR.

EMPLOYEE ID - Required. **SEE STUDENT CARD**.

NAME - Inferred. The name of the employee is displayed.

Personal Information

BIRTHDATE – Required**.** Enter the employee's birthdate (mm/dd/ccyy). Type **10/23/1970**.

SOCIAL SECURITY NUMBER - Inferred. If this field is left blank, it will default to employee ID. The employee's SSN will automatically be displayed based on the fact that the State of Missouri is using the SSN as the employee ID.

PLACE OF BIRTH - Optional. Enter the place the employee was born. Type **JEFFERSON CITY, MO**.

ETHNICITY – Required. Enter the employee's ethnicity code. Valid values are located on the Ethnicity (ETHN) window. Type **W**.

DISABILITY - Optional. Enter the code for the employee's self-declared disability. Valid values are on the Disability Type (DSBL) window.

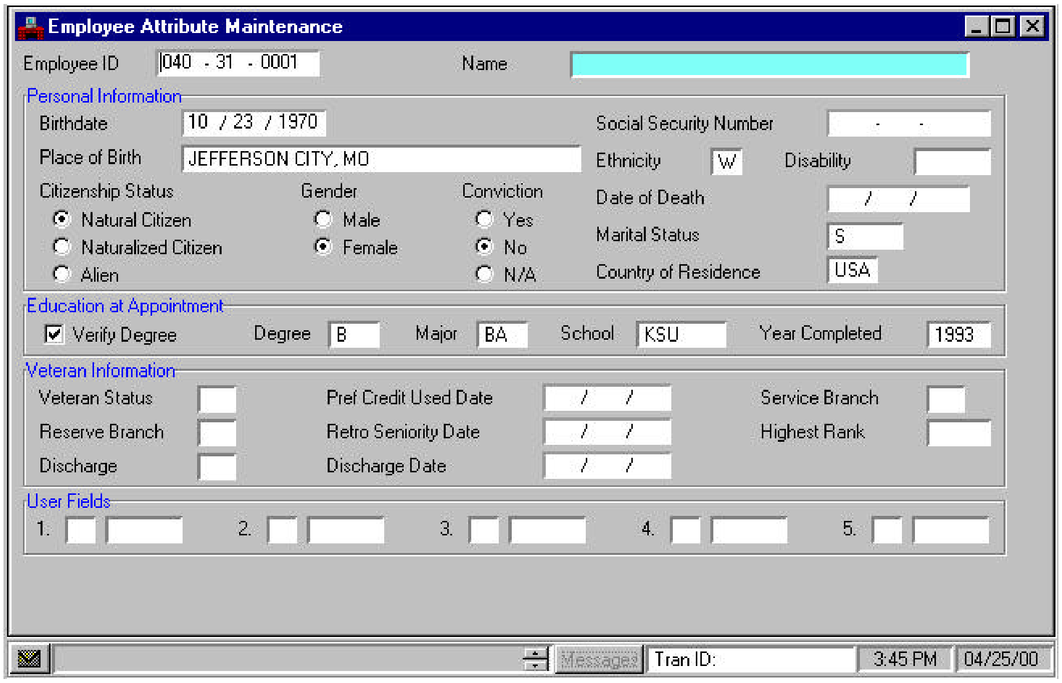
CITIZENSHIP STATUS – Required. Select the radio button to indicate the employee's citizenship status. Select **NATURAL CITIZEN**.

GENDER – Required. Select the employee's gender. Select **FEMALE**.

CONVICTION - Optional. Defaults to N/A. Refer to agency policy. Select **NO**.

DATE OF DEATH - Optional. Enter the date of the employee's death.

EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)



Employee Attribute Maintenance

Employee ID: 040 - 31 - 0001

Name:

Personal Information

Birthdate: 10 / 23 / 1970

Place of Birth: JEFFERSON CITY, MO

Citizenship Status: ● Natural Citizen ○ Naturalized Citizen ○ Alien

Gender: ○ Male ● Female

Conviction: ○ Yes ● No ○ N/A

Social Security Number: - -

Ethnicity: W

Disability:

Date of Death: / /

Marital Status: S

Country of Residence: USA

Education at Appointment

☑ Verify Degree

Degree: B

Major: BA

School: KSU

Year Completed: 1993

Veteran Information

Veteran Status:

Reserve Branch:

Discharge:

Pref Credit Used Date: / /

Retro Seniority Date: / /

Discharge Date: / /

Service Branch:

Highest Rank:

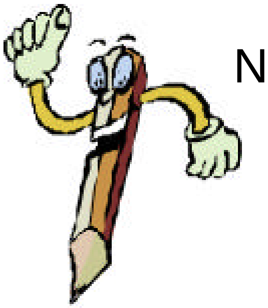
User Fields

1.
2.
3.
4.
5.

Tran ID:

3:45 PM

04/25/00



NOTES

EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)

Step 2 Continue to populate the fields on the ATTR.

MARITAL STATUS - Optional. Enter the code for marital status. Valid values are located on the Marital Status (MSTS) window. Type **S**.

COUNTRY OF RESIDENCE - Optional. Enter the country where the employee has residency status. Valid values are located on the Country (CTRY) table. Type **USA**.

Note: Notice that both the **Education at Appointment** and the **Veteran Information** are optional sections. It will be up to your agency as to whether or not you will fill out these sections. If you fill out the Veteran Information section, you must fill out the entire section, including discharge, dates and service branch. You may choose not to fill out this section because you do not have all of the required information available for a specific employee.

Education at Appointment

VERIFY DEGREE - Optional. Check this box to verify if employee has a degree at the time of employment. Leave blank if the employee does not have a degree. **CHECK BOX**.

DEGREE - Conditional. Required if Verify Degree is checked (Yes). Enter the degree code for the degree obtained. Valid values are located on the Degree (DEGR) window. Type **B**.

MAJOR - Conditional. Required if Verify Degree is checked (Yes). Enter the code for the educational major. Valid values are located on the Formal Education Major (MAJR) window. Type **BA**.

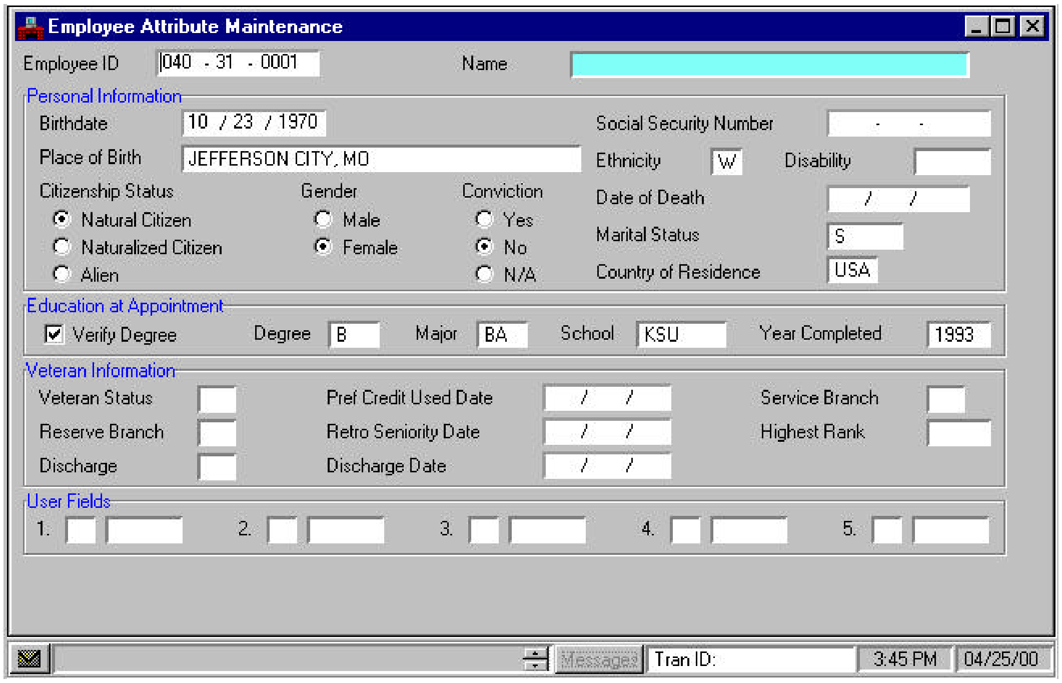
SCHOOL - Conditional. Optional if Verify Degree is checked (Yes). Enter the code for the school attended. Valid values are located on the School (SCHL) window. Type **KSU**.

YEAR COMPLETED - Conditional. Required if Verify Degree is checked (Yes). Enter the year the employee finished the degree in ccyy format. Type **1993**.

Veteran Information

VETERAN STATUS – Optional. Default is "Unknown". Enter the code that indicates whether the employee is a veteran. Valid values are located on the Veteran Status (VETS) window.

EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)



Employee Attribute Maintenance

Employee ID 040 - 31 - 0001

Name

Personal Information

Birthdate 10 / 23 / 1970

Place of Birth JEFFERSON CITY, MO

Citizenship Status
● Natural Citizen
○ Naturalized Citizen
○ Alien

Gender
○ Male
● Female

Conviction
○ Yes
● No
○ N/A

Social Security Number - -

Ethnicity W

Disability

Date of Death / /

Marital Status S

Country of Residence USA

Education at Appointment

☑ Verify Degree

Degree B

Major BA

School KSU

Year Completed 1993

Veteran Information

Veteran Status

Reserve Branch

Discharge

Pref Credit Used Date / /

Retro Seniority Date / /

Discharge Date / /

Service Branch

Highest Rank

User Fields

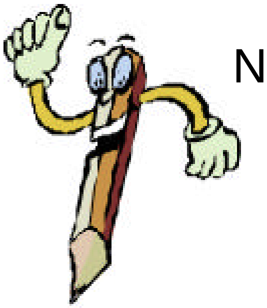
1. 2. 3. 4. 5.

Messages

Tran ID:

3:45 PM

04/25/00



NOTES

EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)

Step 2 Continue to populate the fields on the ATTR.

PREF CREDIT USED DATE – Optional. Leave blank, or enter the date (mm/dd/yy) that the employee used veteran's credits.

SERVICE BRANCH - Conditional. Required if Veteran Status indicates the employee is a veteran. Enter the code that indicates the branch of the Armed Forces in which the employee has served. Valid values are located on the Military Branch (MILB) window.

RESERVE BRANCH - Conditional. Required if Veteran Status indicates the employee is a veteran. Enter the code that indicates whether the employee is in the reserves, and what kind of reserve the employee is in. Valid values are located on the Military Branch (MILB) window.

RETRO SENIORITY DATE – Optional. Leave blank or enter the employee's retroactive seniority date (mm/dd/yy).

HIGHEST RANK - Conditional. Required if Veteran Status indicates the employee is a veteran. Enter the code that indicates the highest military rank held by the employee while in active service. Valid values are located on the Military Rank (MILR) window.

DISCHARGE - Conditional. Required if Veteran Status indicates the employee is a veteran. Enter the discharge type code. Valid values are located on the Discharge Type (DSCG) window.

DISCHARGE DATE - Conditional. Required if Veteran Status indicates the employee is a veteran. Enter the date the employee was discharged from the military.

User Fields

USER FIELDS 1 - Optional. These fields are for agency specific use.

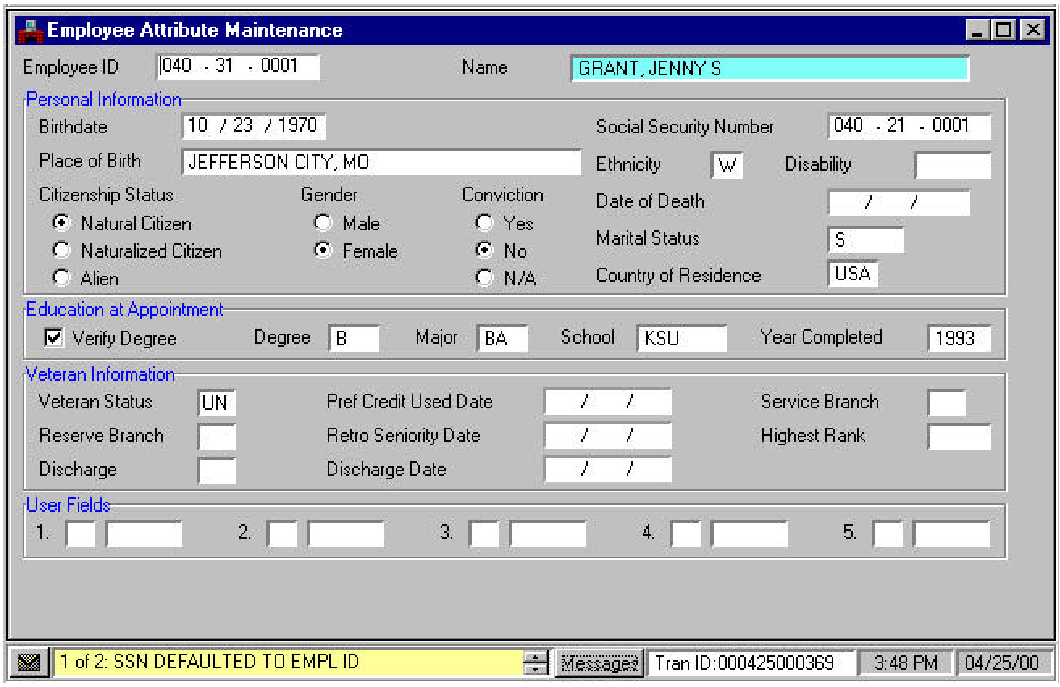
USER FIELDS 2 - Optional. These fields are for agency specific use.

USER FIELDS 3 - Optional. These fields are for agency specific use.

USER FIELDS 4 - Optional. These fields are for agency specific use.

USER FIELDS 5 - Optional. These fields are for agency specific use.

PROCESS AND UPDATE EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)



Employee Attribute Maintenance

Employee ID 040 - 31 - 0001
Name GRANT, JENNY S

Personal Information

Birthdate 10 / 23 / 1970
Social Security Number 040 - 21 - 0001
Place of Birth JEFFERSON CITY, MO
Ethnicity W
Disability
Citizenship Status: ● Natural Citizen ○ Naturalized Citizen ○ Alien
Gender: ○ Male ● Female
Conviction: ○ Yes ● No ○ N/A
Date of Death / /
Marital Status S
Country of Residence USA

Education at Appointment

☑ Verify Degree
Degree B
Major BA
School KSU
Year Completed 1993

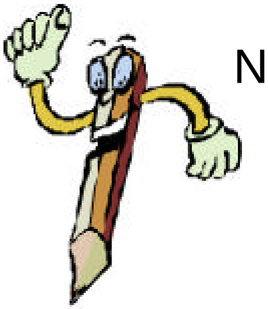
Veteran Information

Veteran Status UN
Reserve Branch
Discharge
Pref Credit Used Date / /
Retro Seniority Date / /
Discharge Date / /
Service Branch
Highest Rank

User Fields

1. 2. 3. 4. 5.

1 of 2: SSN DEFAULTED TO EMPL ID
Tran ID:000425000369
3:48 PM
04/25/00



NOTES

PROCESS AND UPDATE EMPLOYEE ATTRIBUTE MAINTENANCE (ATTR)

You have completed entering the field information for the ATTR and it is time to update the transaction.

Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and select **Process: Update.** If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that the update was successful.

Agency Specific and Accounting Data (AGYS)